

Jason Bauer CA

CERTIFIED FINANCIAL PLANNER



"As a financial professional, I am privileged to provide a wide range of complex services. My clients can expect superior client service and access to a network of strategic, reputable partners to assist you with your family and business needs." ~ Jason



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CLIENT SERVICES



Regular One-on One
Meetings



Qualified
Support Staff



Transparent
Reporting



Investment
Monitoring



Access to
Professional
Network

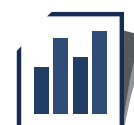
SPECIALIZED SERVICES

TAX MINIMIZATION STRATEGIES	INVESTMENT COMMENTARY	ESTATE PLANNING & WILLS	FINANCIAL PLANNING	INVESTMENT PORTFOLIO DESIGN
Tax minimization is a significant focus of your financial planning and is integrated with outside specialists.	Providing timely commentary and analysis from our portfolio managers and investment teams to offer perspective and help you with your financial planning decisions.	Facilitates the orderly transfer of assets to your beneficiaries to provide security for your survivors while minimizing taxes. May involve external referrals.	Through the financial planning process, we help you assess your financial needs and develop strategies that will enable you to achieve your financial goals.	Recommended solutions based on your individual investment profile, risk tolerance and future needs provide for a solid strategy that fits into your financial plan.

JASON BAUER, CA, CFP

www.acbFinancial.ca

Jason began his financial planning career in 1999 as a Chartered Accountant making a career change to financial planning in 2003. As a CA and CFP, Jason brings particular expertise in the area of tax planning. Along with his team, they strive to provide exceptional service and select quality investments for clients and their families.



ABC FINANCIAL
WEALTH BUILDING CANADA

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